



San Diego Health and Human Services Agency

Client Services Improvement Project Strategy and Plan

Presented by



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Summary of Assessment Findings

Summary of Assessment Finding

An assessment was presented on December 5 detailing the current strengths and challenges of the customer service delivery model through the ACCESS Center and FRCs.

Summary of Findings:

- Client satisfaction surveys indicate clients do want to use ACCESS call center due to convenience and quality of service.
- San Diego County is delivering a simple and accessible customer experience by way of the “no wrong door” policy and multiple access points however many challenges exist;
- ACCESS
 - Insufficient trunking resulting in 350,000+ hang-ups per month
 - Call service levels are low; 24% abandonment of call and average wait time of +30 minutes
 - Staffing levels are not sufficient to handle current or projected “should be” call volumes- between 20% and 35% below required to handle call volumes within acceptable service levels
 - Technology does not support an efficient flow of work within ACCESS and between ACCESS and FRCs
- FRC
 - Clients are unintentionally encouraged to walk into FRC - “All roads lead to the FRC”
 - There is no centralized and robust task tracking tool: Each FRC and each task unit within the FRC have ‘home grown’ tracking tools that are all excel based
 - Lobby Lines are long, directions are confusing, there is no automated check in, EW notification or auto receipts of documents

Summary of Assessment Findings

Overall Organizational Challenges

- Operational processes require **too many hand offs** to effectively offer the customer either:
 - 1st call resolution; Sharepoint hand off to FRCs (16.5%), 211 transfers back to ACCESS
 - ‘No Wrong Door’ process to clients but work still transferred by zip code between FRCs
- Imaging delay and receipt requirements at the FRC encourage clients to call, email and return visit to an FRC
- Organization is not prepared for the online application processing and remote benefits issuance
 - Online applications (BCW) and IVR self service is not well publicized and slower operational processes make this a less desirable channel for customers
 - Phone interviews not currently the default method for conducting CalFresh Intake, RRRs or CalWORKs RRR interviews
- There is no evidence of a joint technical plan to support the current service delivery model, operational needs of ACCESS or the FRC’s or requirements of a future ‘online’ service delivery model. Technology solutions are insufficient for the size of HHSA and not pro-actively anticipating the needs of the organization

High Level Recommendations

Future Model Recommendations

Customer Experience:

1. Re-allocate resources to eliminate operational hand offs; connect process and technology stand alone initiatives into a single view of the desired customer experience

Technology:

1. Install additional phone lines/trunks (along with staff requirements) to receive all client calls
2. Implement a task management tool across ACCESS and FRCs
3. Implement document imaging at the point of entry
4. Implement other call center related technologies to improve the client experience: lobby management kiosks, email management, workforce management for phone staff scheduling

Operations:

1. Increase and allocate staff according to the staffing model assignments and organizational chart positions
2. Migrate work force to flexible work assignments based on customer need vs. task specialization. Phone support staff will do tasks 30% of available time, call handling 70% of time.
3. Revise processes to minimize customer hand offs: e.g. Sharepoint requests, 211 transfers back to ACCESS, zip code allocation of work, BCW applications into task distribution process assigned across all offices
4. Streamline operational reporting to clarify the customer experience and variables impacting that experience; resources, volume of work, channel of access and predictive analytics
5. Drive customer behaviors towards non face to face channels (phone, email, web.) Staff and build processes to support non face to face channels; simple phone interviews and standardized application processing regardless of channel.
6. Improve in person experience in FRC lobbies by adding self-help technologies, improving overall lobby flow and customer interaction with lobby signage, staff and technology.
7. Migrate Intake process to full task model with interviews scheduled centrally and assigned as tasks; emphasis on inbound/outbound **phone** interviews for CalFresh applications and CalWORKs & CalFresh RRRs

Summary of Recommendations:

Current vs. Future State Changes

Current	Recommended/Future
Customer Experience <ul style="list-style-type: none"> • Insufficient staff to answer the telephone - 59 • Insufficient phone line capacity, customers receive call back notification – 142 trunks • Clients experience 30+ minute hold time • 26,804 calls answered live 	<ul style="list-style-type: none"> • Increase phone staff FTE to 110 • Increase phone lines (trunks) to 192-226 (depends on use for interviews) • Reduce average (80%) client wait time at ACCESS to 60 seconds • Eliminate busy message; answer approximately 56,028 calls live
Process and Operations <ul style="list-style-type: none"> • Hand offs and wait times inadvertently encourage clients to visit the FRC's; <ul style="list-style-type: none"> • Long wait time and lines at FRC • Document drop off and lost/not available docs require return visits • Face to face interviews for Cal fresh the standard 	<ul style="list-style-type: none"> • ACCESS staffed to also handle allocated tasks, 70% phone, 30% task (45 FTE) • Staff specialization minimized; work assigned across all offices to staff using TMT tool based on client need • Process built to reduce hand offs- <ul style="list-style-type: none"> • Eliminate Sharepoint tasks • BCW apps processed as task; all apps processed the same regardless of channel received • Imaging at FRC's-eliminate lag time in process • Phone interviews become the standard for CF Intake and RRR and CW RRR, with inbound phone call an option to reduce appointment re-scheduling
Technology <p>Task assignment allocated locally through home grown excel workbooks maintained by supervisors.</p> <p>Document imaging delay</p> <p>Workload is supported by many manual processes not sufficient for a county the size of San Diego:</p> <ul style="list-style-type: none"> • Email response and tracking • Task allocation and reporting • Lobby lines • Staff scheduling 	<p>Universal task management tool built (custom) to allocate tasks to next available worker</p> <p>Documents imaged when and where they are received.</p> <p>Workload supported by technology to improve customer experience, staff efficiency and management visibility;</p> <ul style="list-style-type: none"> • Automated email management • Universal task management • Kiosks and lobby management software • Workforce management tool

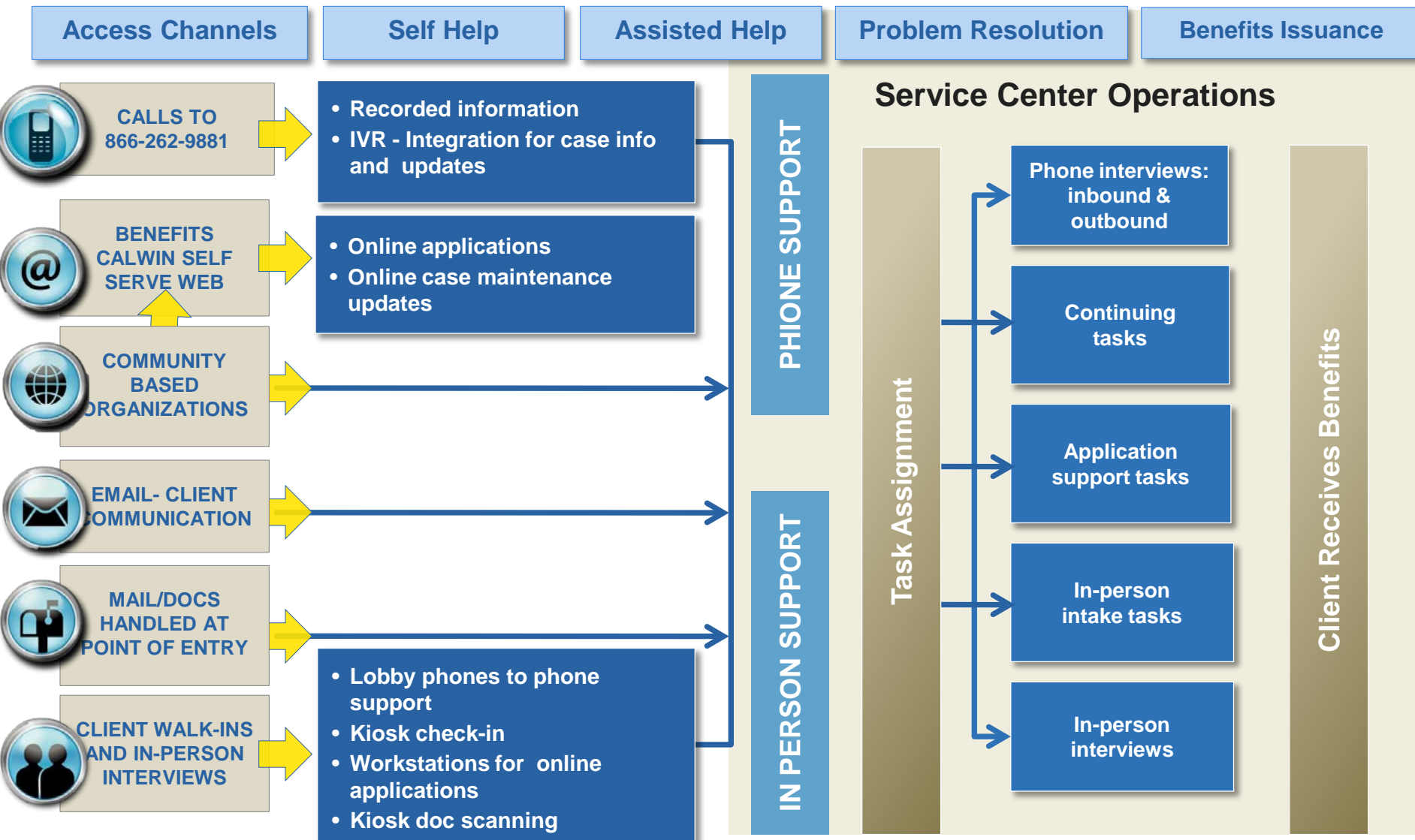
Detailed Recommendations

Needs-Based Customer Experience

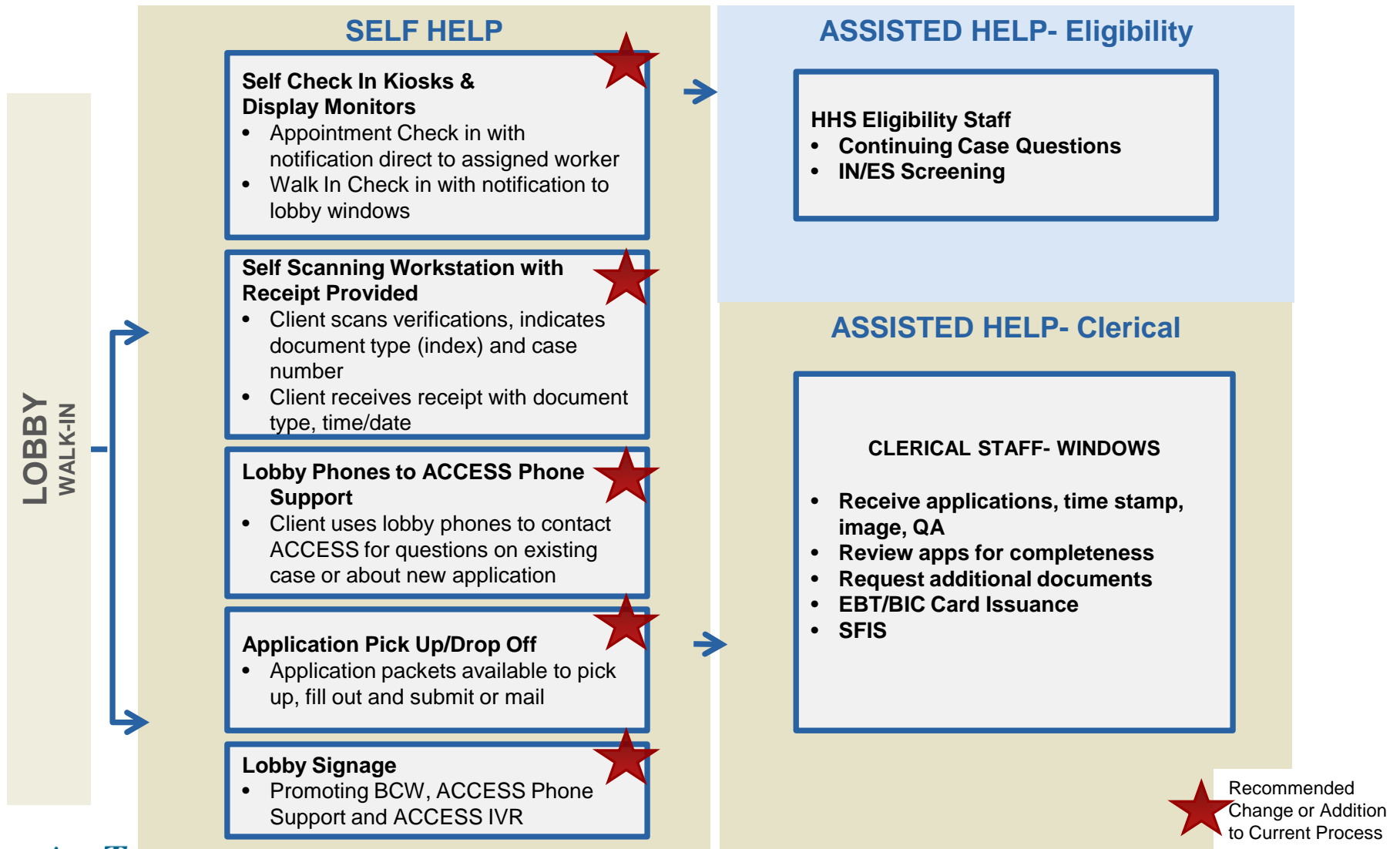
Operational Processes

Needs-Based Customer Experience

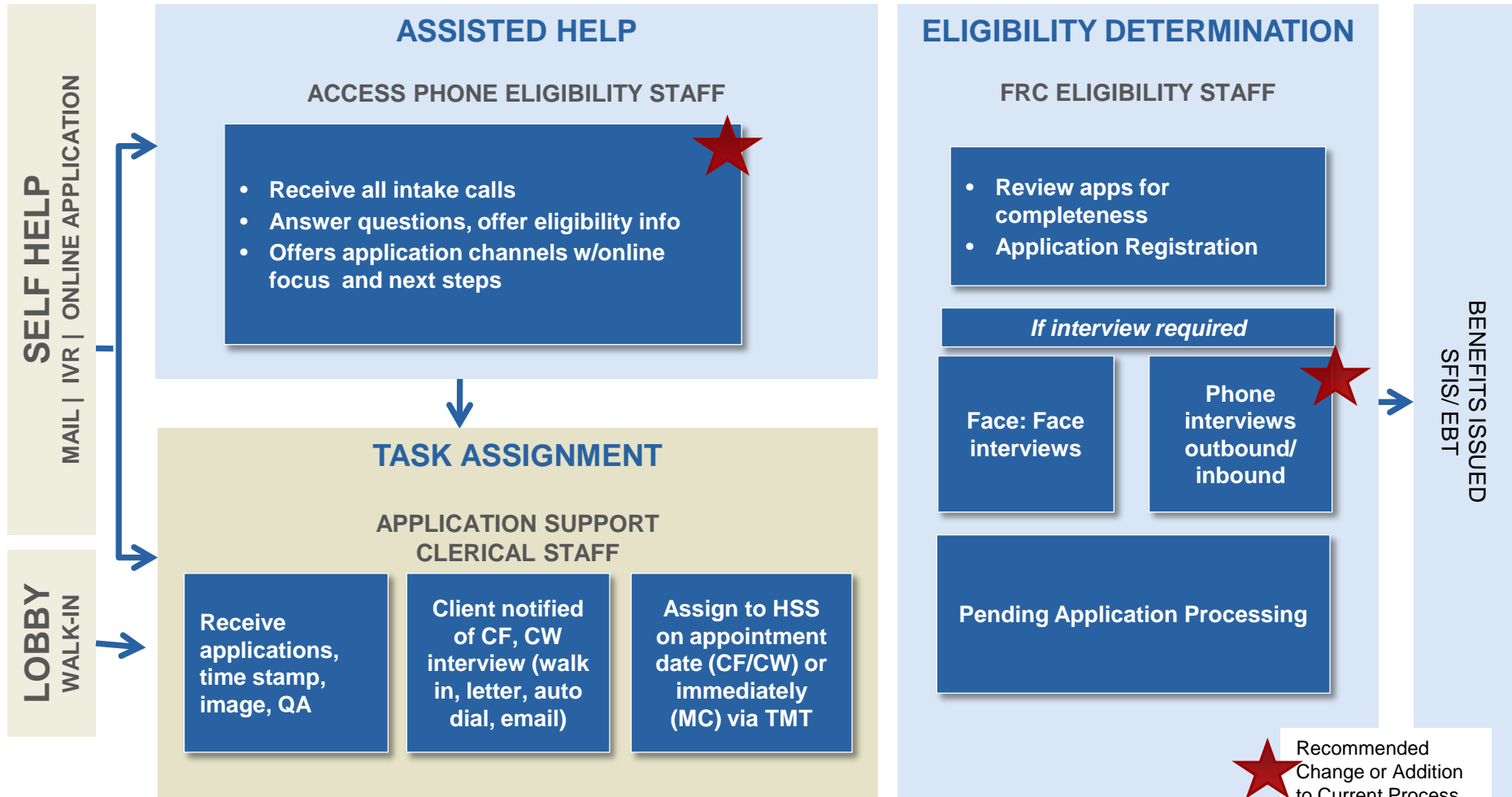
Standardized Processes & Leveraged Technologies for Benefits Programs



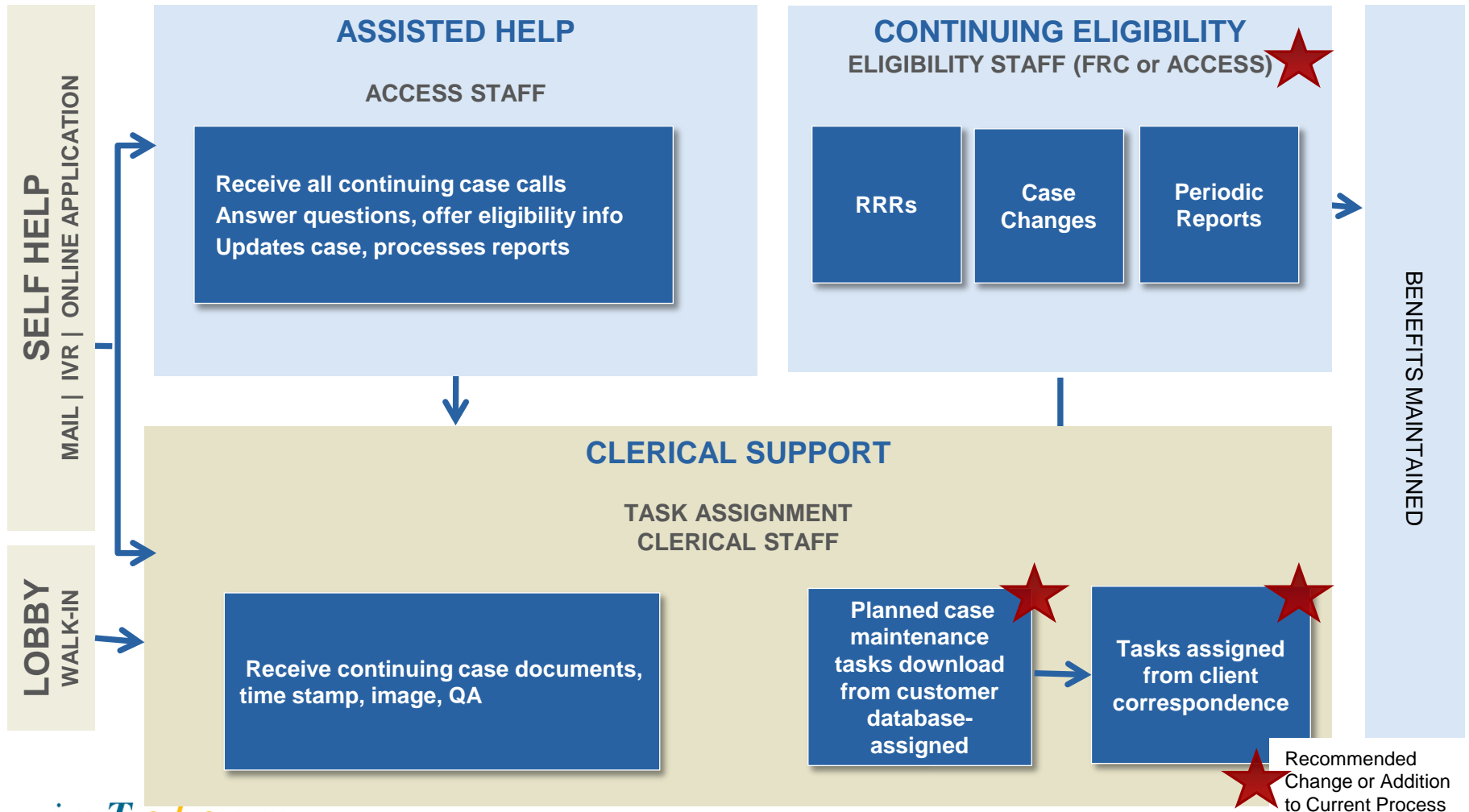
Standardized Lobby Process



Standardized Intake Process

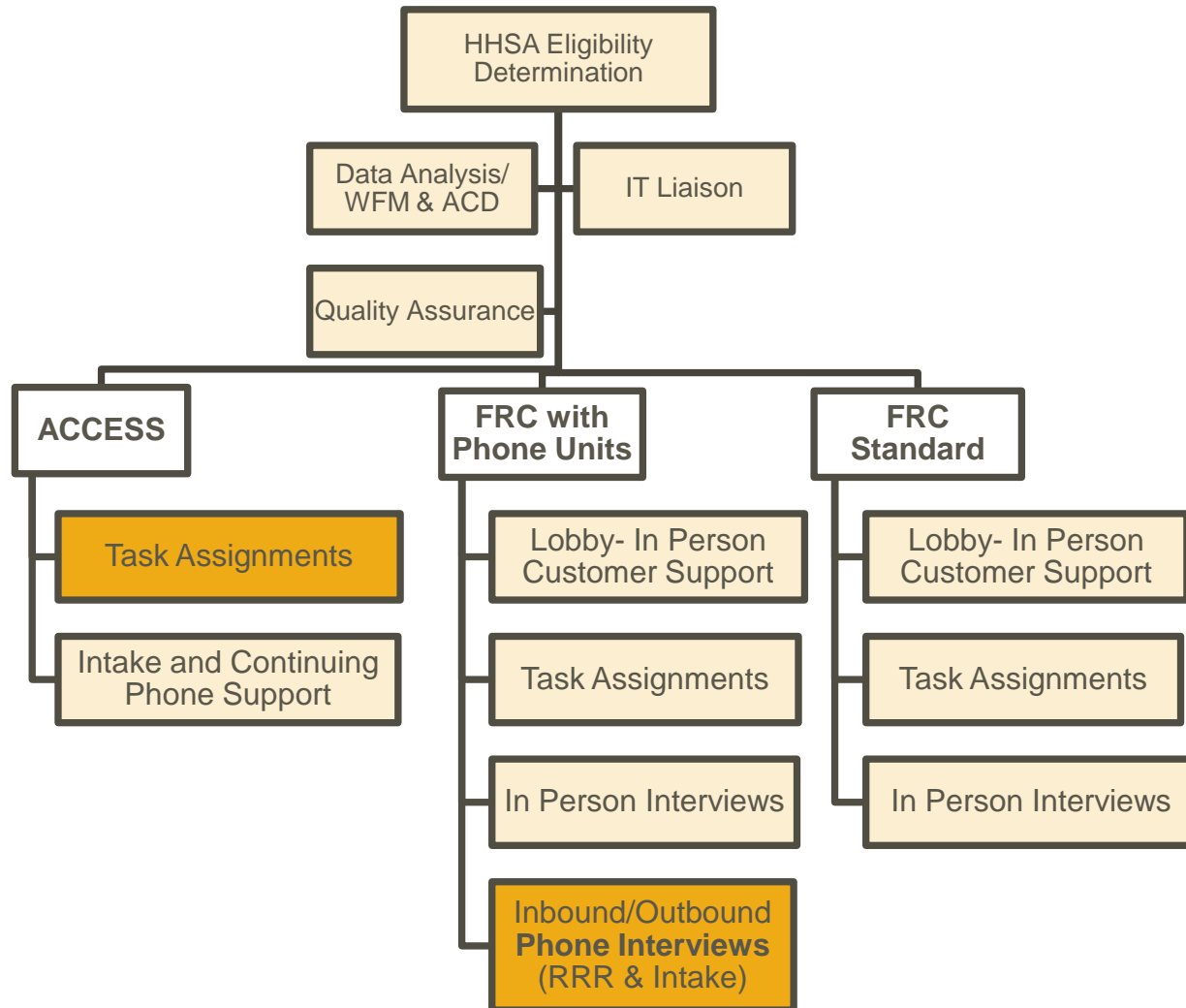


Standardized Continuing Case Management Process



Organization Recommendations

Functional Organization to Supporting the Needs-Based Customer Experience



Function exists today;
modifications required

New Function

Position Requirements in Needs Based Model

- HHSA Eligibility Determination
 - Shared accountability using universal reporting; monitoring of overall customer satisfaction
- IT Liaison
 - Ensure proper functioning of service center technology including ACD, TMT and other support technologies. Work with IT to get support needed.
 - Coordinate strategic planning to identify operational recommendations to increase efficiency across all programs
- Supervisors
 - Manage individual and unit productivity through use of daily, weekly and monthly reporting
 - Ensure equal distribution of workload within unit to maintain outcome measures
 - Manage staff schedule and schedule adherence
 - Ensure proper use of technology tools and request support when needed
- Data Analysis
 - Manage reporting to include data from CalWIN, ACD, IVR, Task Management, Appointment Management, WFM and Call Recording and payroll data. Reports to deliver metrics on both the customer experience and operational efficiency
 - Create and deliver weekly and monthly dashboards across all programs
 - Manage Staff scheduling software (WFM) and deliver staff schedules that meet the demands of the client through use and analysis of historical trends in volumes.
- Quality
 - Manage quality programs and work with Supervisors to ensure proper use of quality technology.
 - Consolidate and report quality measurements to management.

Staffing Model Assumptions

Sept 2011	Medi-Cal	CalFresh	CalWORKs	CAPI	Total	% increase assumptions used
Applications/Month	9,785	10,660	3,782	23	24,250	CF 18%; MC 6%; CW 0%
Granted Cases	129,078	76,445	31,748	247	237,500	

	ACCESS	FRC	Total	% growth since 2009
Sept 2009 Actual Staff*	72 (no ERA unit at that time)	769	841	
Sept 2011 Actual Staffed*	84 (76 w/out ERA included)	753	837	-.5%

Business Model Assumptions

- Call volume to 211 maintained; Call backs from 211 are eliminated
- “Sharepoint” transfers to FRC are eliminated
- BCW applications are handled in a task based model just as any other application type
- Client email projected increase from today’s volume by 20% in 2013 then and additional 13% in 2014 -2015

70/30 definition

- ACCESS Phone staff will be assigned responsibilities that include task assignments. Assumption that 70% of an average day is scheduled phone coverage and 30% is task work. Task work assumed to be case change and periodic report related tasks

Staffing Model Inputs

- Staffing model based on case and applicaton projections, tasks related to cases/applicatons, projected call volumes and task handle times based on input from San Diego staff
- Call handle time assumption of 11 minutes average

Clerical Assumptions

- Clerical staffing based on assumption that some task types will not require manual input into TMT; clerical responsibilities in general duties and lobby will remain the same
- Assumptions included document imaging at the point of entry in all FRCs and TMT task assignment duties:
 - The majority of the tasks will be auto generated and auto assigned by the TMT Application; the exceptions to the auto generation and assignment are pending application tasks and Changes.: 150% of the pending task volume will require clerical creation and assignment; 50% of the change task volume will require clerical creation and assignment
- General Clerical Support to FRCs: There are also 31 fixed Clerical Staff in the model (Mailroom, supplies, Lobby Ambassador)
- MIC clerical includes existing 12 FTE plus projection for additional to cover projected increase in mail in/ BCW and mail in verifications

ACCESS Volumes and Projections

	Sept 2011 237,500 Granted Cases 24,250 Apps/Month		Jan 2013- based on growth
Measurement	ACCESS Current Results	Projections** / Month- Current	Projections-/month Jan 2013 based on growth projections
Attempts	406,311	0	
Calls Offered	67,657	86,378	94,964
<i>Calls/Case Ratio</i>	.26	.33	.33
Calls Answered Live	26,804 (40%)	50,963 (59%)	56,028
Abandoned	16,036 (24%)	4,319 (5%)	4,749
Answered by 211	10,058 (15%)	12,957 (15%)	14,245
Transferred Out	2,907 (4%)	3,455 (4%)	3,798
Self Serve	11,852 (17%)	14,684 (17%)	16,144

*unduplicated case count

**Projections assume adequate trunking capacity to accept all calls from client base

HSS & Clerical Staffing Model Analysis based on 2013 case growth assumptions

ACCESS HSS Staff Requirements		
	January 2013	
Phone FTE	110	
PubAssist	3	
30% Task FTE	45	
Total	158	
Sep 2011		
Current Staff	Budgeted	Actual
ACCESS HSS	85.2	84

FRC HSS Staff Requirements		
	January 2013	
Application Processing	231	
Pending	38	
Change	371	
RRR	158	
Periodic Rpt	59	
Total HSS FTE	857	
Sep 2011		
Current Staff	Budgeted	Actual
FRC- not including METRO	776	753

Clerical Staff Requirements		
	January 2013	
Intake/Pending	129	
Continuing Support	153	
TMT/POE Imaging	40	
MIC- Expanded	42	
Total	364	
Sept 2011		
Current Clerical Staff	Budgeted	Actual
ACCESS	20	17
MIC	12	12
FRCs	274	248
Total	306	277

HSS Supervisor Requirements <small>* does not include corrective action supervisors or automation coordinators</small>		
	January 2013	
ACCESS	19	
FRC	83	
Total	102	
Sep 2011		
Current Staff	Budgeted	Actual
ACCESS HSS Supervisors	8	8
FRC HSS Supervisors	114	111
Total SHSS (Supervisors)	122	119

New Business Model Training Plan

- All Staff- Task Management Tool
 - Typical training requirement would include 1.5 hour classroom/lab with on the job support following.
- HSS Staff- Process
 - Revised intake and continuing processes
 - Call Handling
 - Interview skills- phone and face to face
 - Operations, Goals and Expectations
 - Quality Processes
- Supervisors and Management
 - Metrics Management
 - Quality Management
- Clerical
 - Lobby Processes
 - Kiosk functionality and operation
 - Appointment Management tool
- Staged Training
 - Train HSS staff on the required training in a staged training cycle to ensure proper coverage of normal business while staff is trained on new technology and processes.
- Projected Training Time Required
 - HSS- 2.5 days total
 - Supervisors= 2 days total
 - Clerical- 2 days total

Technology Overview

Technology Requirements

Budget Requirements

Technology Assessment Overview

- Technology to support the ACCESS Call Center and the FRC does not support an efficient operation. Workflow is mostly manual.
 - The phone system and ACD are adequate for the current scope and scale of ACCESS
 - Insufficient trunking (phone lines in)
 - Task management is the foundation to a task based system; current tools are not meeting basic task management requirements.
 - Email offered to the client with no email management software.
 - Imaging at the point of entry is needed at FRCs for 'real time' document management. Lost and delayed documents 'create' work and frustrate clients.
 - Available reporting does not tie the customer experience channels together, report on key productivity metrics or support predictive analytics needed for management action
 - Lobby Management could be significantly improved with technology solutions; check in kiosks, appointment notification, scheduling software

Technology:

1. **Install additional phone lines/trunks (along with staff requirements) to receive all client calls**
2. **Implement a task management tool across ACCESS and FRCs- Build or Borrow options**
3. **Implement document imaging at the point of entry**
4. **Implement other service center related technologies to improve the client experience:**
 - **Lobby management kiosks**
 - **Email management**
 - **Dialer technology for automated outbound calls**
 - **Workforce management for staff scheduling**

Trunking Analysis and Recommendation

Current Structure

- 6 T1 PRI = 142 Trunks in use by 211, Self Service and ACCESS client calls
- Trunk Requirement

Given Parameters	Interview Call back	Inbound Calls	Comments
Calls Per Month:	6,000	86,000	
Length of Call	1200	405 Expressed in seconds	

Assumptions	Values	Values	Comments
Blocking Factor	1%	1% (Percentage of calls during busy hour that are blocked)	
Busy Hour factor	1.5%	1.5% (Percentage of calls that arrive during the busiest hour of the month)	
Average Wait	75	75 Expressed in seconds	

Busy Hour Calculations	Values	Values	Comments
Calls during busy hour	90	1290	Busy hour factor * Calls per month
Length of call	1275	480	Average Wait + Length of Call
Busy Hour Traffic	114750	619200	Busy Hour Calls * Length of Call (In Seconds)
Busy Hour Traffic	32	172	Busy Hour Calls * Length of Call (In Erlangs)
Trunks Needed:	44	192	Using the Erlang-B Calculations
Trunks Needed Combined:		226	Efficiency gained when combining both requirements together

- Interview calls assumes a 60% reach rate, 40% of phone interviews requiring inbound call back from client
- One erlang is the equivalent of one call (including call attempts and holding time)
- Busy hour projection based on experience at other county service centers using real data on the busiest hour on a typical high call volume day (Tuesday at the beginning of the month after a Monday holiday).

TMT Solutions Used at Other Counties

	San Mateo	Santa Cruz	Placer	Santa Clara	Tulare	Santa Barbara	Sacramento	Orange
Programs CO = Continuing IN = Intake	CO: MC,CF	CO/IN: MC, CF, CW, FC	CO/IN: MC, GR, CW, CF	CO/IN: MC, CF, GA, CW	CO: MC,CF	CO: MC, CF	CO: MC	CO: MC, CF
Task Solution	Northwoods Compass	Strataframe ASP .NET	ASP .NET, C#	CA Service Desk	Proprietary ASP .NET	Visual Basic	Proprietary ASP .NET	Proprietary ASP .NET, C#
Reporting	Compass	MS SQL Reporting	MS SQL Reporting	Business Objects	MS SQL Reporting	Crystal Reports	MS SQL Reporting	Crystal Reports, BO
Agency-Wide	Underway	TBD	Yes	Yes	No	No	No	No
End-to-End	TBD	TBD	Yes	Yes	TBD	TBD	TBD	No
User-Aware	TBD	No	Yes	No	No	No	Yes	Yes
Imaging Integration	Yes	No	Yes	No	No	No	Yes	No
Scheduling	Yes	No	No	No	No	No	No	No
Self Check-in	No	No	No	Yes	No	No	No	No
CalWIN /CIS Upload	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes
Auto-Assign	Partial	No	Yes	No	Yes	No	Yes	Planned
Equalization	TBD	No	No	No	No	No	No	Planned
Dialer Support	TBD	No	Yes	No	No	No	No	No

Document Imaging at the Point of Entry

Current Situation

- The majority of documents that need to be imaged are dropped off at the FRC.
- A receipt is given, but the documents go into a basket to be imaged at a later time
- Delay in getting the documents imaged and accessible by ACCESS causes unnecessary calls, return trips to the FRC, and duplicate submissions

Recommendation

- Install scanners at each FRC lobby
- Clerical staff that issue receipts today image the document prior to issuing the receipt
- Additionally, enable self-scanning and auto receipt through lobby self-help technology

Items to be Budgeted

Budget Category	High Level Assumptions	Budget Examples
Telephony	Current ACD used by the ACCESS center and can be extended to cover ACD users at regional offices	Voice, Chat, Email licenses are \$1,250 for first license and \$250 for each service additional license
- Telesets	Voice is deployable through existing phone system to; Intake Phone Support could be at any office	Professional Services required to scope costs and perform integration and configuration to extend ACD to one or more FRCs
- Auto Dialer	Tool that automates calls to client for appointment notification and reminder	Usually available with ACD implementation
- Predictive Dialer	Places an outbound call and transfers the call to a live when the client acknowledges the call. Predictive dialers use statistical algorithms to minimize the time that workers spend waiting between conversations, while also minimizing the occurrence of someone answering when no worker is available.	About \$1,000/user, Concurrent Additional hardware and professional services may be required; Need to define operational plan to determine
Email Management	Off the shelf database tool that manages inbound emails as the ACD manages inbound calls. Routes, tracks and performs closed-loop tracking on all client emails. Can be linked with Task Management tool for assignment of email as a task	\$20,000-\$50,000 range based on complexity and volume.

Items to be Budgeted

Budget Category	High Level Assumptions	Budget Examples
Workforce Mgmt	Would require integration with ACD, and initial configuration (Professional Services), user training (Administrators), user licenses (admin and all supported staff)	One Time Costs \$50,000-\$80,000 Licensing \$1,000 concurrent Training Professional Services
Self Check-in	check-in kiosks or touch screen terminals running custom software are two possible options	Example Self Check-in kiosks are \$6,000/ea; Software to drive overhead displays is \$4,000 per lobby
Document Imaging	Additional scanners and scanning, capture software required to implement scanning in FRC lobbies	\$1,000-\$5,000 per scanning station based on speed and size of scanners
Self Scanning	Scanning at the point of client entry to lobby via self-help workstation or kiosk	Example Self Scanning kiosks are \$12,000/ea
Lobby BCW	Kiosks or workstations are possible options for Lobby BCW hardware; Connectivity to Internet required;	\$500 to \$1,000 per workstation including furniture and security
Task Mgmt Tool	Custom built solution that links all FRC and ACCESS built in a complex database tool and easy to use UI, standard for all FRC/ACCESS. Custom and Developed reporting.	Project management, professional services and licensing (potentially) - for all staff

Technology Overview

ACD License Impact							
	ACCESS HSS	ACCESS SHSS	211	Other ACCESS Overflow sites	FRC Interview Group-	FRC Interview Group- Sup	Total
Current ACD Licenses	69	7	10	10	0	0	
Additional ACD Licenses at 70/30	86	8	-3	0			
Interviews (assumes group does both F2F and Phone)					88	9	

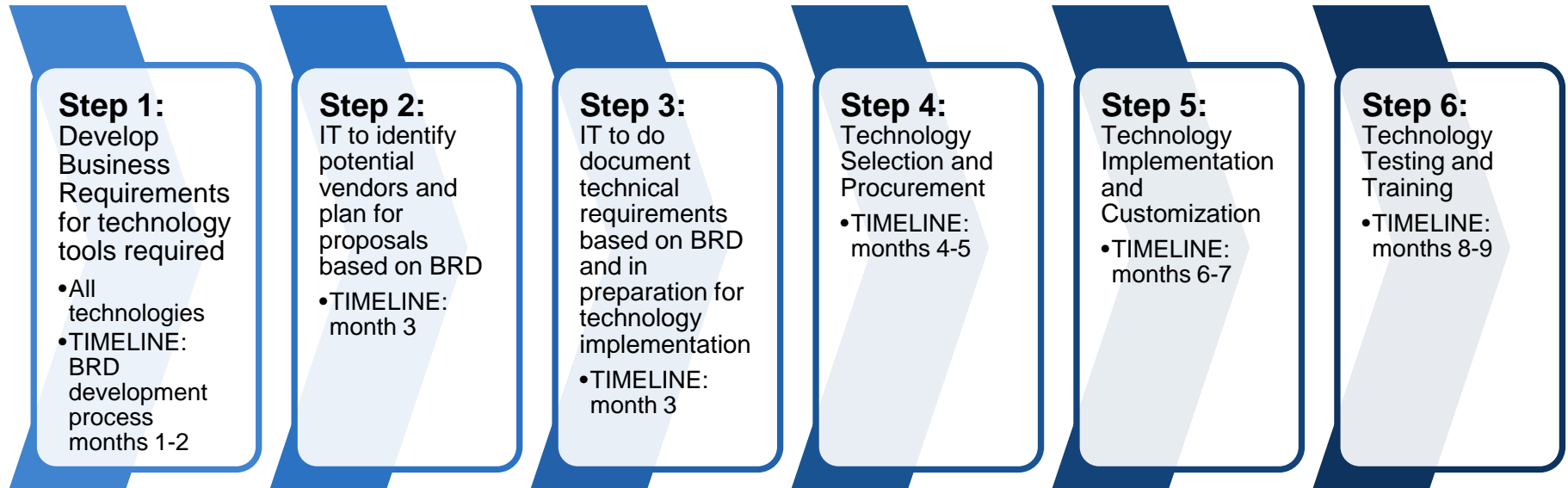
Call Recording Impact							
	ACCESS HSS	ACCESS SHSS	211	Other ACCESS Overflow sites	FRC Interview Group-	FRC Interview Group- Sup	Total
Current Witness Licenses	69	7	10	10	0	0	
Additional Licenses at 70/30	86	8	-3	0			
Interviews					88	9	

Technology Overview

Workforce Management Impact						
	ACCESS HSS	ACCESS SHSS	Other ACCESS Overflow sites	FRC Interview Group-	FRC Interview Group- Sup	Total
Current WFM Licenses	0	0	0	0	0	
Additional Licenses at 70/30	155	15	0	0	0	
Interviews				0	0	

Task Management Tool	
	70/30
Current Users	0
FRC Users	1023
ACCESS Users	185
Total	1,208

Technology Timeline Considerations During Design and Build Process



Design & Implementation Plan

Timeline for implementation

Committee structure

Budget requirements

Timeline Recommendations

- Stage 1
 - Implement changes at ACCESS and those FRCs designated at Inbound/Outbound phone interview locations.
 - Allows for required time to retrain all staff on processes and on new technologies (especially TMT)
 - Smaller launch enables quick changes or modifications to be made before full roll out
- Stage 2
 - Roll out process and technology changes to all remaining FRCs

Key Design and Build Milestones

	Key Milestone	Target Date
Stage 1	Assessment Delivered to Executives and Managers	Completed
	Strategy and Plan Draft Delivered	Completed
	Design and Build Process Kick Off	Completed
	Strategy and Plan Delivery to Staff	Completed
	Design and Build Committees Operational	March
	ACCESS and FRC Future Staffing Levels Approved	Completed
	Technology Requirements Finalized and Programming or Procurement Starts	April 15
	Technology/Infrastructure Requirements and Procurement Starts	June 15
	TMT Development and UAT Complete	Aug 30
	Other Technology Testing and Implementation Complete	Aug 30
	Lobby Redesign Complete in Stage 1 FRC (s); Imaging at Point of Entry – all FRCs	Aug 30
	Stage 1 FRC and ACCESS Staff Trained in new processes and technology; moved if required	Oct 19
	TMT Task Distribution in ACCESS Center and Stage 1 FRC(s)	Oct 24
Stage 2	ACCESS Process redesign launched; FRC Phone Units for Inbound/Outbound Phone Interviews Implemented- Stage 1 FRC(s)	Oct 24
	Lobby and Process Redesign Complete in all remaining FRC subject to space availability	Mar 2013
	Stage 2 FRC Staff Trained in new processes and technology	Mar 2013
	Stage 2 FRC Launch	April 2013

Customer Experience Impact Objectives

Objective	Projection	Month 1-3	4-6	7-9	10-12
Forecasted Case & Applications	<i>Projected Growth by Program</i>				
Forecasted Call Volumes	<i>Calls/Case-App Ratio of .33</i>				
Average Call Handling	<i>11 minutes</i>				
Average speed of answer decreased	<i>From 30 minutes to 1 minute</i>				
Call Service Level increased (SL= 80% calls answered in 60 seconds)	<i>80% in 60 seconds</i>				
Online Applications increased	<i>25%</i>				
Lobby Traffic decreased	<i>25%</i>				
Customer Satisfaction	<i>Maintain or improve to 80% satisfied</i>				
Employee Satisfaction	<i>Maintain or improve to 80% satisfied</i>				

Recommended Measurements

Design and Build Committee Structure

Committee	San Diego Design and Build Committees Responsibilities	Participation	Meeting Frequency/ Duration
Executive Oversight	<ul style="list-style-type: none"> • Stewardship of the overall project • Approval of key design decisions as requested by Steering • Budget Approval 	<ul style="list-style-type: none"> • Agency Director • Chief Operating Officer • Director, Strategic Planning and Operational Support • Deputy Director, East and North Central Regions • Deputy Director, Central and South Regions • Deputy Director North Coastal and North Inland Regions • Group Information Technology Manager 	Once a Month 1 hour
Steering	<ul style="list-style-type: none"> • Review and approve committee work products • Provide cross committee communication • Provide Executive Oversight Presentation Material • Outcome Measures • Dashboard Development • Training Requirements and Training Plan • (Curriculum customization via Staff Development resources) 	<ul style="list-style-type: none"> • Leads of each of the Committees • ACCESS Manager • Staff Development Manager • Regional Managers 	Twice a Month 2 hours

Design and Build Committee Structure

Committee	San Diego Design and Build Committees Responsibilities	Participation	Meeting Frequency/ Duration
FRC Ops/Lobby	<ul style="list-style-type: none"> • Design Goals • Intake process diagrams for all application & interviews types • Lobby Traffic Management Processes and Procedures • Staffing Requirements, HSS, SHSS, Clerical Staff and Sups for Task Work, Task Creation and Assignment, Imaging, Mail, Phone/ F2F Interview Group. • Organization Structure, Roles and Responsibilities • Task Tracking Requirements, UAT Testing and Implementation • Technology Business Requirements for Check In, Appointment Scheduling, Notification, Window Management, Imaging • Lobby Signage • Facility Requirements • Reporting Requirements 	<ul style="list-style-type: none"> • Lead – FRC Manager • 2 FRC Managers • 4 FRC Supervisors • 2 FRC HSS Staff • Clerical Supervisor • 2 Clerical Staff • Facility Manager 	Twice a Month 2 hours Out of meeting work as required
ACCESS Center	<ul style="list-style-type: none"> • Process Diagrams for Call • Phone/Task Work Ratio- define task work that ACCESS staff will do. • Staff Requirement for HSS, SHSS, Clerical Staff and Sups for Phone, Task Work, PubAssist, 211 integration • Organization Structure, Roles and Responsibilities • Task Tracking Requirements, UAT Testing and Implementation • Business Requirements for WFM • Reporting Requirements and Implementation – Call Handling, Task Work, PubAssist, 211, WFM, Call Review • Define and Implement Individual Productivity Management Processes • PubAssist Processes and Marketing • Training Requirements • Facility Requirements 	<ul style="list-style-type: none"> • Lead – ACCESS Supervisor or Manager • 3 ACCESS Supervisors • 2 ACCESS Call Agents • Clerical Supervisor • 2 Clerical Staff • ACD/ Reporting Analyst • Facility Manager 	Twice a Month 2 Hours Out of meeting work as required

Design and Build Committee Structure

Committee	San Diego Design and Build Committees Responsibilities	Participation	Meeting Frequency/ Duration
TMT	<ul style="list-style-type: none"> Gap Analysis of current product/plan and High Level Requirements Project Planning to fill any gaps Detailed Requirements Functional Specifications UAT Management Implementation and Change Control 	<ul style="list-style-type: none"> Lead 2 IT Staff 2 ACCESS Supervisors (At least 1 the same as on the ACCESS Committee) 2 FRC Supervisors (At least 1 the same as on the FRC Committee) Clerical Supervisor (Same as FRC Committee) 2 Clerical Staff 	Twice a month 2 hours Out of meeting work as required
Technology	<ul style="list-style-type: none"> Telephony Requirements and licenses WFM Requirements, RFP, ROI and Vendor Selection Auto Dialer Requirements, ROI and Vendor Recommendation Kiosk Requirements, ROI and Vendor Recommendation Email Management Requirements, ROI and Vendor Selection Reporting Delivery 	<ul style="list-style-type: none"> Lead – IT 3 IT Staff 1 ACCESS Supervisor 1 FRC Supervisor (Same as Lobby Committee) 1 Clerical Supervisor 	Twice a month 1.5 hours Out of meeting work as required
Communication	<ul style="list-style-type: none"> Communication Master Strategy Employee Pre and Post Surveys Client Pre and Post Surveys CBO Liaison and Communications Employee and Client Communications 	<ul style="list-style-type: none"> Lead – FRC Manager or Marcom Manager 1 ACCESS Supervisor 2 ACCESS HSS Staff 2 FRC Supervisors 2 FRC HSS Staff 	Twice a month 1.5 hours Out of meeting work as required

Project Risks

- Focus :
 - Staged implementation not supported under proposed InTelegy contract
 - Conflicting initiatives or priorities could drain management resources from focus on this change
 - Executive Management focus on long term operational initiatives
- Organizational concerns over staff re-allocation; managerial oversight
- Technology resources and expertise
- Budget